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EUROPEAN CITRUS IMPORTS AND  
U.S. CITRUS TRADE, 1968-69 SEASON

CURRENT SERIAL RECORDS

The Western European Market For Fresh Citrus

Oranges (including tangerines).--Virtually every country in Western Europe imported more oranges in 1969 resulting in a record total of 92.4 million boxes (see table 1). This represented an increase of 8.9 million boxes over 1968. France registered the largest gain, 4.6 million boxes, but West Germany and Belgium also showed substantial increases.

Spanish oranges and tangerines were more plentiful on the European market in 1969 totaling 34.4 million boxes. This amount was 3.8 million boxes above the 1968 level and more than double that from any other supplier. About 82 percent was taken by the EC countries. Israeli shipments, although more evenly distributed among the importing countries than Spain's, declined for the first time since 1964 and totaled 16.4 million boxes. Receipts from Morocco increased to 14.2 million boxes, thus narrowing the gap between the second and third ranking suppliers. Of the major countries participating during the summer marketing period, both South Africa and Brazil suffered declines from a year earlier, while the United States reversed its poor 1968 performance.

Despite the wall of protectionism embracing Italian oranges within the European Community, shipments from Italy into the other EC member states declined again, but imports from third countries increased.

Lemons.--The market for lemons has shown very little growth over the last 6 years, with imports totaling 10 million boxes in 1964 compared with 10.4 million in 1969. Only half the countries listed in table 2 registered an increase in imports over 1968. West Germany, the major importer in Western Europe, received 3.8 million boxes in 1969--down from 4 million in 1968, while France increased receipts from 2.8 million to 3 million boxes. Italy supplied two-thirds of the European market. The United States and Spain were a distant second and third, respectively.



Grapefruit.--After seven consecutive yearly increases, imports of grapefruit into the countries listed in table 3 registered a decline of 1 percent to 7.8 million boxes. Of the three dominant importers, the United Kingdom and West Germany purchased less grapefruit while France registered a substantial increase. Israel supplied 4 million boxes and retained its commanding position in the European market despite a relatively poor crop. South Africa, the major supplier during the summer months, increased its shipments from 1 million boxes to 1.3 million.

#### The Western European Market For Citrus Juices

The amount of citrus juice imported by the individual countries listed in tables 4 through 11 declined in half of the eight markets, including the three largest, the United Kingdom, West Germany, and France. In most instances, the volume imported from the United States declined sharply.

The United Kingdom imported more single-strength juice but less concentrate, and for the second season total imports were below the previous year. Israel dominates the U.K. market for most juices and registered further increases in the single-strength orange juice and single-strength grapefruit juice categories.

West Germany imported more orange and grapefruit juice than in the previous year, but experienced a drop in receipts of other citrus juices. Israel was the major supplier of grapefruit juice while the Netherlands once again ranked first in the other categories.

France also imported less juice with all three categories--orange, grapefruit, and lemon--registering declines. Morocco was the principal source with Israel second and the United States falling to third. The United States ranked first 2 years previously.

Four of the remaining five countries imported more citrus juice than the preceding year. Despite the increases recorded by these four markets--Belgium, Denmark, the Netherlands and Sweden--the United States suffered sharp losses and fell from the first-ranking position in each. Austrian imports were down substantially, with Italy recording the largest decline.

#### U.S. Fresh Citrus Exports

U.S. exports of fresh citrus fruits in 1968-69 reflected the level of production. Exports of both oranges and grapefruit exceeded the 1967-68 total, while shipments of lemons declined. U.S. exports of fresh citrus are shown in tables 12 through 14.

After the extremely poor showing in 1967-68, exports of oranges increased 90 percent to 8.8 million boxes. However, this total was 1 million boxes below 1966-67. Virtually all markets received more oranges, including Canada, the major customer.



Total shipments during the 1969-70 winter marketing season registered only a small increase from the same period last year. The United States lost over half its European market, but Canada and Hong Kong more than made up for this decline.

Lemon exports in 1968-69 totaled 3.1 million boxes, almost 400,000 less than the previous season. Exports to Japan, the major market for U.S. lemons, reached 1.2 million boxes, but exports to Europe fell 28 percent to 1.3 million. This loss took place entirely during the summer marketing period.

In the 1969-70 winter marketing period, total exports were 11 percent above the same period in 1968-69 largely because of increased shipments to Japan.

U.S. exports of grapefruit rose to 3 million boxes compared with 2.3 million in 1967-68. Shipments to Canada increased 673,000 boxes for a total of 2.5 million, or 83 percent of the fresh grapefruit exported. United States participation in the rapidly expanding European market was at the lowest level since 1954-55, only 431,000 boxes.

Total exports for the 1969-70 winter marketing season were about the same as the previous winter's performance.

#### U.S. Processed Citrus Exports

Most of the major processed citrus products registered increases in 1968-69, with the notable exception of single-strength orange juice. For the first time in several years, exports of this commodity declined, with shipments falling to 9.3 million gallons from the record of 13.2 million achieved in 1967-68. Losses were suffered in virtually all markets. Exports of single-strength grapefruit juice increased to 5.2 million gallons from 4.5 in 1967-68, primarily because of further expansion in Canada. Frozen orange juice concentrate exports remained at last season's level, 4.2 million gallons, as a decline in shipments to Europe was offset by an increase in the Canadian market. Although more hot pack orange juice concentrate was exported than in 1967-68, the total, nevertheless, remained at a relatively low level. U.S. exports of citrus products are shown in table 15.

#### U.S. Citrus Imports

Imports of oranges (including tangerines) dropped to 1.4 million boxes in 1968-69 from 2.1 million the previous season as a result of the substantial increase in U.S. production. Imports from Israel increased slightly, but receipts from Mexico fell 44 percent. Heavy volume the first 2 months of the 1968-69 season before the U.S. industry was actively processing pushed total imports of orange juice concentrate to 12.7 million gallons (single-strength equivalent) from 11.8 million in 1967-68. Brazil supplied 81 percent of the total. U.S. imports of major fresh and processed citrus are shown in table 16.

Table 1.--Oranges (including tangerines), Fresh: Imports into Western Europe  
from Specified Countries, 1967-69

Importing Country	Country of Origin									
	Algeria	Brazil	Israel	Italy	Morocco	South Africa	Spain	United States	Other	Total
	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /	1,000 boxes <sup>1</sup> /
<b>EC:</b>										
Belgium:										
1967.....	---	---	770	19	14	252	2,408	755	356	4,574
1968.....	---	---	761	6	249	429	2,337	135	614	4,531
1969.....	---	---	792	17	299	571	2,612	549	627	5,467
France:										
1967.....	2,885	305	830	71	6,888	1,611	8,871	431	1,261	23,153
1968.....	2,002	231	1,054	47	6,556	1,794	8,431	18	907	21,040
1969.....	3,680	173	991	46	7,722	1,706	9,701	476	1,102	25,597
West Germany:										
1967.....	325	458	3,749	1,859	2,526	1,292	12,536	97	999	23,841
1968.....	314	383	4,581	1,738	2,919	1,183	11,376	2	1,296	23,792
1969.....	407	294	4,366	1,556	3,361	1,012	12,953	134	1,729	25,812
Italy: 2/										
1967.....	---	---	---	---	---	---	---	---	1	1
1968.....	---	---	---	---	---	---	---	---	1	1
1969.....	---	---	---	---	---	---	---	---	---	---
Netherlands:										
1967.....	156	857	1,146	127	610	314	2,860	762	703	7,535
1968.....	239	588	1,838	148	851	736	2,600	138	993	8,031
1969.....	230	434	1,351	79	590	508	2,936	1,008	1,170	8,306
<b>Total EC:</b>										
1967.....	3,366	1,620	6,495	2,076	10,038	3,469	26,675	2,045	3,320	59,104
1968.....	2,555	1,202	8,234	1,839	10,575	4,142	24,744	293	3,811	57,395
1969.....	4,317	901	7,500	1,698	11,972	3,797	28,202	2,167	4,628	65,182
<b>Other Europe:</b>										
Austria:										
1967.....	2	57	666	765	4	90	284	4	685	2,557
1968.....	---	28	711	753	18	99	186	2	812	2,609
1969.....	2	22	838	928	51	74	123	8	885	2,931
Denmark:										
1967.....	1	52	607	9	87	65	454	53	20	1,348
1968.....	1	47	565	8	36	54	532	5	70	1,318
1969.....	2	43	622	11	48	53	516	49	84	1,428
Finland:										
1967.....	---	11	729	16	83	155	276	1	69	1,340
1968.....	6	36	675	13	91	143	195	---	138	1,297
1969.....	6	61	821	18	128	143	199	3	146	1,525
Norway:										
1967.....	3/	9	411	6	190	130	706	194	52	1,698
1968.....	8	19	440	6	409	244	686	10	91	1,913
1969.....	21	9	512	9	440	184	538	148	59	1,920
Sweden:										
1967.....	1	83	1,160	441	264	65	1,305	101	12	3,432
1968.....	42	49	1,193	506	198	36	1,240	5	180	3,449
1969.....	14	31	1,262	570	285	90	1,073	53	171	3,549
Switzerland:										
1967.....	12	89	503	1,150	22	88	922	1	112	2,899
1968.....	13	70	549	1,312	14	75	827	3/	157	3,027
1969.....	32	85	616	1,255	44	52	938	22	97	3,141
United Kingdom:										
1967.....	---	634	4,215	2	869	3,151	2,563	217	818	12,469
1968.....	---	448	4,989	1	982	3,115	2,204	4	817	12,560
1969.....	---	487	4,190	6	1,233	2,596	2,858	99	1,293	12,762
<b>Grand Total:</b>										
1967.....	3,382	2,555	14,786	4,465	11,557	7,213	33,185	2,616	5,088	84,847
1968.....	2,625	1,899	17,356	4,438	12,323	7,908	30,614	319	6,086	83,568
1969.....	4,394	1,639	16,361	4,495	14,201	6,989	34,447	2,549	7,363	92,438

1/ Equivalent boxes of 70 pounds. 2/ Country of origin not identified. 3/ Less than 500 boxes.



Table 2.--Lemons, Fresh: Imports into Western Europe  
from Specified Countries, 1967-69

Importing Country	Country of Origin								
	Cyprus	Greece	Israel	Italy	South Africa	Spain	United States	Other	Total
	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/
<u>EC:</u>									
<u>Belgium:</u>									
1967.....	---	52	---	101	---	---	255	51	459
1968.....	---	65	---	133	---	---	231	68	497
1969.....	---	---	---	209	---	---	184	116	509
<u>France:</u>									
1967.....	88	163	110	755	29	739	751	95	2,730
1968.....	224	180	112	990	13	483	715	71	2,788
1969.....	225	142	82	1,339	44	608	434	85	2,959
<u>West Germany:</u>									
1967.....	1	10	2	3,044	10	488	76	224	3,855
1968.....	10	29	---	3,375	6	336	72	149	3,977
1969.....	5	21	1	3,284	6	246	23	221	3,807
<u>Italy:</u>									
1967.....	---	---	---	---	---	---	---	---	---
1968.....	---	---	---	---	---	---	---	---	---
1969.....	---	---	---	---	---	---	---	---	---
<u>Netherlands:</u>									
1967.....	8	23	16	87	---	11	132	13	290
1968.....	12	16	23	130	1	4	157	24	367
1969.....	12	16	3	179	2	5	83	46	346
<u>Total EC:</u>									
1967.....	97	248	128	3,987	39	1,238	1,214	383	7,334
1968.....	246	290	135	4,628	20	823	1,175	312	7,629
1969.....	242	179	86	5,011	52	859	724	468	7,621
<u>Other Europe:</u>									
<u>Austria:</u>									
1967.....	---	32	2	612	7	2/	43	4	700
1968.....	2/	31	1	636	12	1	35	6	722
1969.....	1	33	1	646	10	---	21	2	714
<u>Denmark:</u>									
1967.....	2	1	32	80	4	3	69	11	202
1968.....	4	2	34	80	1	2	74	7	204
1969.....	3	2	19	111	6	6	34	12	193
<u>Finland:</u>									
1967.....	1	2	22	25	9	1	41	2	103
1968.....	---	---	19	29	11	---	33	7	99
1969 3/.....	---	---	---	---	---	---	---	112	112
<u>Norway:</u>									
1967.....	1	2/	5	6	3	2	51	3	71
1968.....	3	---	8	3	2	1	55	1	73
1969.....	1	---	10	11	1	1	50	2	76
<u>Sweden:</u>									
1967.....	2	---	23	28	3	4	110	5	175
1968.....	1	---	33	20	1	2/	127	3	185
1969.....	7	---	28	46	1	1	98	10	191
<u>Switzerland:</u>									
1967.....	---	8	3	441	---	39	23	4	518
1968.....	---	3	2	464	1	18	31	4	523
1969.....	3	3	1	494	---	20	15	2	538
<u>United Kingdom:</u>									
1967.....	125	3	63	542	100	26	83	41	983
1968.....	155	1	75	594	69	11	49	45	999
1969.....	122	1	30	642	119	15	22	28	979
<u>Grand Total:</u>									
1967.....	228	294	278	5,721	165	1,313	1,634	453	10,086
1968.....	409	327	307	6,454	117	856	1,579	385	10,434
1969.....	379	218	175	6,961	189	902	964	636	10,424

1/ Equivalent boxes of 76 pounds. 2/ Less than 500 boxes. 3/ Country of origin not identified.

Table 3.--Grapefruit, Fresh: Imports into Western Europe  
from Specified Countries, 1967-69

Importing Country	Country of Origin							
	Cyprus	Honduras	Israel	Morocco	South Africa	United States	Other	Total
	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/
<b>EC:</b>								
Belgium:								
1967.....	---	---	205	---	---	77	29	311
1968.....	---	---	244	---	---	2/	89	333
1969.....	---	---	217	---	110	2/	84	411
France:								
1967.....	24	10	652	65	185	278	85	1,299
1968.....	23	25	1,029	25	132	134	119	1,487
1969.....	18	10	1,080	24	323	203	57	1,715
West Germany:								
1967.....	210	68	860	23	313	109	147	1,730
1968.....	265	67	1,315	1	245	21	137	2,051
1969.....	236	135	1,102	3	244	85	96	1,901
Italy:								
1967.....	---	---	92	---	35	---	10	137
1968.....	---	---	150	3/	---	---	32	182
1969.....	---	---	175	---	46	---	99	320
Netherlands:								
1967.....	9	7	184	5	3	92	132	432
1968.....	18	36	314	---	2	67	143	580
1969.....	40	57	167	---	17	91	130	502
<b>Total EC:</b>								
1967.....	243	85	1,993	93	536	556	403	3,909
1968.....	306	128	3,052	26	379	222	520	4,633
1969.....	294	202	2,741	27	740	379	466	4,849
<b>Other Europe:</b>								
Austria:								
1967.....	1	3/	52	3/	14	4	5	76
1968.....	3	---	61	---	11	1	6	82
1969.....	5	3/	53	---	16	1	3	78
Denmark:								
1967.....	10	12	52	1	6	14	6	101
1968.....	11	22	43	3/	6	3	7	92
1969.....	9	23	54	3/	19	6	7	118
Finland:								
1967.....	3/	3/	46	---	9	4	1	60
1968.....	4	2	44	---	10	2	3	65
1969 4/.....	---	---	---	---	---	---	82	82
Norway:								
1967.....	2	3/	17	---	6	13	1	39
1968.....	2	---	19	---	6	8	2	37
1969.....	2	---	20	---	10	7	3/	39
Sweden:								
1967.....	1	1	70	---	3	46	6	127
1968.....	1	1	68	---	8	26	9	113
1969.....	2	1	59	---	8	20	21	111
Switzerland:								
1967.....	16	---	188	---	30	29	13	276
1968.....	29	---	186	---	23	8	7	253
1969.....	33	3/	161	1	32	9	7	243
<b>United Kingdom</b>								
1967.....	408	---	773	30	487	40	496	2,234
1968.....	473	---	1,152	13	525	4	386	2,553
1969.....	482	---	914	8	464	11	384	2,263
<b>Grand Total:</b>								
1967.....	681	98	3,191	124	1,091	706	931	6,822
1968.....	829	153	4,625	39	968	274	940	7,828
1969.....	827	226	4,002	36	1,289	433	970	7,783

1/ Equivalent boxes of 80 pounds. 2/ Included in "other". 3/ Less than 500 boxes.

4/ Country of origin not identified.



Table 4.--Austria: Imports of citrus juices,  
by countries of origin, 1963-64 to 1968-69

Item and Country of Origin	Year beginning October 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
<u>ORANGE JUICE,</u>						
<u>CONCENTRATED</u> 1/						
United States.....	25.4	4.3	30.2	58.0	189.2	71.2
Germany, West.....	34.0	23.8	25.4	59.4	5.7	28.0
Israel.....	57.6	195.8	120.8	44.1	140.6	75.7
Italy.....	141.2	158.6	93.0	77.1	18.9	24.9
South Africa.....	6.4	30.2	4.5	33.0	4.0	90.6
Spain.....	75.0	47.7	77.8	60.7	64.5	56.4
Other.....	63.4	19.6	60.3	102.5	48.9	75.3
TOTAL.....	403.0	480.0	412.0	434.8	471.8	422.1
<u>ORANGE JUICE,</u>						
<u>SINGLE-STRENGTH</u> 1/						
United States.....	74.8	90.5	112.3	361.8	941.3	584.5
Brazil.....	24.5	67.4	72.5	69.4	42.2	38.9
Germany, West.....	254.0	287.3	436.8	213.8	227.2	190.1
Greece.....	42.7	229.5	162.3	163.1	177.3	67.7
Israel.....	910.5	1,061.1	1,087.9	1,276.7	1,914.1	1,674.9
Italy.....	201.2	203.3	255.0	261.3	1,319.0	404.4
South Africa.....	36.6	112.7	114.3	27.1	117.0	307.8
Spain.....	57.5	82.6	70.4	86.4	53.1	40.4
Other.....	120.3	58.5	47.0	190.4	691.9	389.2
TOTAL.....	1,722.1	2,192.9	2,358.5	2,650.0	5,483.1	3,697.9

1/ Includes an unknown quantity of lemon juice.

Table 5.--Belgium: Imports of citrus juices,  
by countries of origin, 1964 to 1968

Item and Country of Origin	Calendar Year						
	1964	1965	1966	1967	1968	1969	
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	
CITRUS JUICES (All)							
United States.....	513	544	591	1,610	3,009	1,960	
Germany, West.....	58	---	17	123	140	522	
Greece.....	514	546	389	389	523	704	
Israel.....	886	800	845	987	1,448	2,314	
Italy.....	28	64	30	75	100	366	
Morocco.....	1/	49	152	129	1/	160	
South Africa.....	323	83	259	1/	422	636	
Spain.....	343	264	227	1/	167	222	
Other.....	659	394	2/1,211	3/1,431	1,702	1,614	
TOTAL.....	3,324	2,744	3,721	4,744	7,511	8,498	

1/ If any, included under "other".

2/ Includes 203 metric tons from Argentina and 231 metric tons from Brazil.

3/ Includes 121 metric tons from Argentina and 271 metric tons from Brazil.

Table 6.--Denmark: Imports of citrus juices,  
by countries of origin, 1964 to 1969

Item and Country of Origin	Calendar Year						
	1964	1965	1966	1967	1968	1969	
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	
CITRUS JUICES (All)							
United States.....	235	387	816	3,542	2,172	944	
Brazil.....	1/	1/	396	181	555	470	
Greece.....	918	1,337	1,694	668	506	510	
Israel.....	742	784	832	970	1,147	2,384	
Italy.....	336	280	335	328	151	582	
Spain.....	638	437	450	392	329	487	
Sweden.....	26	25	74	348	1/	98	
United Kingdom.....	202	310	150	70	59	86	
Other.....	93	194	336	423	209	493	
TOTAL.....	3,190	3,754	5,083	6,922	5,128	6,054	

1/ If any, included under "other".



Table 7.--France: Imports of citrus juices,  
by countries of origin, 1964 to 1969

Item and Country of Origin	Calendar Year					
	1964	1965	1966	1967	1968	1969
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
<b>ORANGE JUICE (ALL)</b>						
United States.....	1/	1/	409	3,862	5,764	2,890
Algeria.....	1,539	362	1,889	3,203	1,259	135
Greece.....	128	1,208	808	190	303	564
Israel.....	169	419	776	1,955	2,463	3,525
Italy.....	85	35	196	140	140	355
Morocco.....	4,746	4,234	4,740	3,999	7,061	7,211
Spain.....	1/	25	31	45	129	652
Other.....	103	123	75	32	383	102
TOTAL.....	6,770	6,406	8,924	13,426	17,502	15,434
<b>LEMON JUICE (ALL)</b>						
Algeria.....	11	1/	76	43	1/	1/
Italy.....	242	348	255	518	409	132
Other.....	128	186	139	131	188	2/ 387
TOTAL.....	381	534	470	692	597	519
<b>GRAPEFRUIT JUICE (ALL)</b>						
United States.....	1,395	3,713	1,941	5,740	3,593	2,518
Algeria.....	517	16	971	1,205	392	399
Israel.....	749	2,224	2,718	3,507	3,705	2,593
Morocco.....	3,300	2,929	2,953	2,610	4,183	2,932
South Africa.....	69	1/	1/	46	1/	421
Other.....	174	56	18	45	45	3/1,297
TOTAL.....	6,204	8,938	8,601	13,153	11,918	10,160

1/ If any, included under "other".

2/ Includes 299 metric tons from the Netherlands.

3/ Includes 822 metric tons from Greece and 333 metric tons from the Netherlands.

Table 8.--Netherlands: Imports of citrus juices,  
by countries of origin, 1964 to 1969

Item and Country of Origin	Calendar Year					
	1964	1965	1966	1967	1968	1969
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
<u>CITRUS JUICES (All)</u>						
United States.....	685	487	778	2,194	2,589	1,854
Argentina.....	41	45	148	202	126	1/
Belgium-Luxembourg..	167	243	546	685	1,012	1,091
Brazil.....	1/	17	391	1,176	2,111	3,438
Germany, West.....	83	180	1,295	1,555	1,444	1,513
Greece.....	202	240	95	295	144	108
Israel.....	1,360	2,055	2,462	3,206	2,259	2,395
Italy.....	490	424	712	955	1,118	1,893
Jamaica.....	96	223	186	60	69	32
Mexico.....	30	20	30	1/	1/	1/
Morocco.....	292	447	230	260	322	196
Mozambique.....	62	112	166	48	282	396
South Africa.....	482	487	549	528	347	182
Spain.....	659	700	777	1,355	956	496
Other.....	181	238	139	234	283	585
TOTAL.....	4,830	5,918	8,504	12,753	13,062	14,179

1/ If any, included under "other".



Table 9.--Sweden: Imports of citrus products,  
by country of origin, 1964 to 1969

Item and Country of Origin	Calendar Year					
	1964	1965	1966	1967	1968	1969
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
<u>CITRUS JUICES (All)</u>						
<u>UNSWEETENED</u>						
United States.....	1,015	1,232	1,733	4,252	12,918	9,931
Brazil.....	---	13	150	226	428	880
Greece.....	402	420	360	269	72	107
Israel.....	3,120	3,632	3,756	3,400	4,572	7,173
Italy.....	416	396	216	285	241	534
South Africa.....	312	175	175	137	91	127
Spain.....	533	200	540	578	894	757
United Kingdom.....	66	189	214	276	1,308	555
Other.....	155	204	523	488	460	186
TOTAL.....	6,019	6,461	7,667	9,911	19,984	20,250
<u>CITRUS JUICES (All)</u>						
<u>SWEETENED</u>						
United States.....	66	70	50	46	44	49
Israel.....	17	21	25	11	1/	1/
Other.....	50	31	30	24	27	60
TOTAL.....	133	122	105	81	71	109
<u>CANNED CITRUS</u>						
<u>SECTIONS</u>						
United States.....	15	20	19	20	16	14
Mainland China.....	74	111	142	37	81	27
Israel.....	12	14	96	97	135	160
Japan.....	932	1,270	1,202	1,038	818	1,118
Spain.....	1/	30	140	19	59	162
Taiwan.....	140	32	1/	5	1/	91
Other.....	7	11	73	79	27	21
TOTAL.....	1,180	1,488	1,672	1,295	1,136	1,593

1/ If any, included in "other".

Table 10.--United Kingdom: Imports of citrus products,  
by countries of origin, 1963-64 to 1968-69--Continued

Item and Country of Origin	Year beginning November 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	1,000	1,000	1,000	1,000	1,000	1,000
	cases	cases	cases	cases	cases	cases
	<u>24/2's</u>	<u>24/2's</u>	<u>24/2's</u>	<u>24/2's</u>	<u>24/2's</u>	<u>24/2's</u>
<u>GRAPEFRUIT, TINNED OR</u>						
<u>BOTTLED, IN SYRUP</u>						
United States.....	22	27	29	19	7	<u>1/</u>
British Honduras.....	135	67	180	218	220	269
Cyprus.....	62	42	51	97	84	150
Israel.....	507	485	626	730	886	1,015
Jamaica.....	564	633	578	504	539	498
South Africa.....	266	199	320	333	454	491
Trinidad.....	97	93	138	180	111	124
Other.....	18	5	12	48	60	104
TOTAL.....	1,671	1,551	1,934	2,129	2,361	2,651
<u>ORANGES, TINNED OR</u>						
<u>BOTTLED, IN SYRUP</u>						
China.....	33	49	131	120	206	72
Cyprus.....	15	18	15	19	25	24
Israel.....	10	7	8	4	9	7
Japan.....	1,692	1,337	1,648	1,561	1,235	1,588
South Africa.....	13	5	23	6	14	7
Spain.....	2	4	9	30	33	59
Taiwan.....	<u>1/</u>	26	34	37	28	41
Other.....	55	5	14	18	22	19
TOTAL.....	1,820	1,451	1,882	1,795	1,572	1,817

1/ If any, included under "other".

2/ Includes both sweetened and unsweetened juices.



Table 11.--West Germany: Imports of citrus juices  
by countries of origin, 1968 and 1969

Item and Country of Origin	1 9 6 8			1 9 6 9		
	Sweetened	Not sweetened	Total	Sweetened	Not sweetened	Total
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
<b>ORANGE JUICE 1/</b>						
United States.....	44	8,076	8,120	53	4,426	4,479
Argentina.....	2/	495	495	2/	413	413
Brazil.....	2/	6,822	6,822	20	7,904	7,924
France.....	2/	404	404	2/	81	81
Greece.....	2/	6,582	6,582	2/	5,131	5,131
Israel.....	3,037	3,556	6,593	3,114	5,454	8,568
Italy.....	179	3,774	3,953	58	2,942	3,000
Jamaica.....	2/	53	53	2/	2/	2/
Morocco.....	2/	3,785	3,785	2/	5,877	5,877
Netherlands.....	7,072	1,426	8,498	4,228	4,930	9,158
South Africa.....	103	2,300	2,403	65	3,865	3,930
Spain.....	2/	3,394	3,394	2/	3,591	3,591
United Kingdom.....	49	21	70	45	2/	45
Other.....	20	103	123	54	374	428
TOTAL.....	10,504	40,791	51,295	7,637	44,988	52,625
<b>GRAPEFRUIT JUICE 1/</b>						
United States.....	---	---	655	---	---	1,057
China.....	---	---	104	---	---	163
Greece.....	---	---	179	---	---	1,509
Israel.....	---	---	4,298	---	---	3,400
Morocco.....	---	---	157	---	---	204
South Africa.....	---	---	268	---	---	33
Other.....	---	---	204	---	---	742
TOTAL.....	---	---	5,865	---	---	7,108
<b>OTHER CITRUS JUICE 1/</b>						
United States.....	---	---	518	---	---	363
Brazil.....	---	---	541	---	---	145
Greece.....	---	---	557	---	---	2/
Israel.....	---	---	417	---	---	432
Italy.....	---	---	3,403	---	---	2,971
Netherlands.....	---	---	7,495	---	---	5,532
South Africa.....	---	---	89	---	---	14
Spain.....	---	---	126	---	---	59
United Kingdom.....	---	---	205	---	---	257
Other.....	---	---	27	---	---	177
TOTAL.....	---	---	13,378	---	---	3/ 9,950

1/ Of a density of 1.33 (specific gravity) or less.

2/ If any, included under "other".

3/ Includes 6,611 Metric Tons of Lemon Juice.

Table 12.--Oranges (including tangerines), Fresh: United States Exports  
by areas of destination, 1967-68 to 1969-70

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	November 1 - April 30			May 1 - October 31		
	1967-68	1968-69	1969-70	1967	1968	1969
	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/
Canada.....	2,199	2,726	2,835	2,048	1,162	1,781
Europe						
EC:						
Belgium-Lux. ....	3	78	18	575	94	47
France.....	2/	73	42	316	23	377
Germany, W. ....	2/	7	1	64	6	69
Netherlands.....	3	245	77	908	143	1,233
Total.....	6	403	138	1,863	266	1,726
Other:						
Denmark.....	---	6	23	30	5	41
Norway.....	2/	8	34	126	8	141
Sweden.....	3	11	10	59	4	39
United Kingdom....	1	15	7	162	5	60
Other.....	2	6	3	7	---	6
Total.....	12	449	215	2,247	288	2,013
Far East & Oceania						
Hong Kong.....	324	525	691	606	339	792
Malaysia & Sing. ...	3	20	62	113	2	53
New Zealand.....	---	43	27	---	---	28
Philippines.....	25	35	12	37	20	25
Other.....	72	82	124	94	86	123
Total.....	424	705	916	850	447	1,021
Caribbean & L. Am.						
Bahamas.....	14	13	8	19	21	18
Mexico.....	7	2	4	29	9	16
Neth. Antilles.....	23	13	8	21	7	16
Other.....	3	4	2	7	4	6
Total.....	47	32	22	76	41	56
Other markets.....	1	2/	2/	2	2/	---
Total all markets....	2,683	3,912	3,988	5,223	1,938	4,871

1/ Equivalent boxes of 70 pounds.

2/ Less than 500 boxes.



Table 13.--Lemons and Limes, Fresh: United States Exports  
by areas of destination, 1967-68 to 1969-70

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	November 1 - April 30			May 1 - October 31		
	1967-68	1968-69	1969-70	1967	1968	1969
	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/	1,000 boxes 1/
Canada.....	208	242	203	232	241	258
Europe						
EC:						
Belgium-Lux. ....	53	54	40	117	119	28
France.....	199	200	225	402	434	183
Germany, W. ....	4	11	42	172	226	222
Netherlands.....	96	128	126	243	281	173
Total.....	352	393	433	934	1,060	606
Other:						
Denmark.....	16	13	27	34	47	18
Finland.....	32	17	15	14	12	16
Norway.....	30	21	27	23	37	31
Sweden.....	52	59	44	61	76	55
United Kingdom.....	17	15	14	55	29	8
Other.....	4	1	5	130	9	18
Total.....	503	519	565	1,251	1,270	752
Far East & Oceania						
Hong Kong.....	22	24	27	29	30	32
Japan.....	530	546	699	444	536	603
Other.....	7	10	5	6	6	5
Total.....	559	580	731	479	572	640
Mexico.....	48	35	30	63	50	24
Other markets.....	3	5	1	5	4	4
Total all markets.....	1,321	1,381	1,530	2,030	2,137	1,678

1/ Equivalent boxes of 76 pounds.

Table 14.--Grapefruit, Fresh: United States Exports  
by areas of destination, 1967-68 to 1969-70

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	September 1 - April 30			May 1 - August 31		
	1967-68	1968-69	1969-70	1967	1968	1969
	1,000	1,000	1,000	1,000	1,000	1,000
	boxes 1/	boxes 1/	boxes 1/	boxes 1/	boxes 1/	boxes 1/
Canada.....	1,442	1,885	1,856	605	384	614
Europe						
EC:						
Belgium-Lux. ....	18	11	7	37	23	2
France.....	136	106	106	135	37	64
Germany, W. ....	28	31	32	18	10	25
Netherlands.....	72	64	92	108	53	77
Total.....	254	212	237	298	123	168
Other:						
Norway.....	6	2	5	9	6	5
Sweden.....	43	19	14	18	4	3
United Kingdom...	4	8	2	14	5	2
Other.....	4	7	10	25	7	5
Total.....	311	248	268	364	145	183
Far East & Oceania						
Hong Kong.....	2	3	2	1	1	3
Japan.....	19	25	33	13	15	20
Other.....	1	1	12	1	1	6
Total.....	22	29	47	15	17	29
Other markets.....	7	7	8	5	7	6
Total all markets....	1,782	2,169	2,179	989	553	832

1/ Equivalent boxes of 80 pounds.

Table 15.--Orange and Grapefruit Products: United States Exports  
by countries of destination, 1963-64 through 1968-69

Item and Country of Destination	Year beginning November 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons
<u>CANNED SINGLE- STRENGTH JUICE</u>						
Orange:						
Canada.....	3,232	3,901	5,194	6,321	5,455	4,337
Europe						
Belgium-Lux. ....	74	34	36	156	472	267
Denmark.....	12	17	60	564	327	109
France.....	6	2	80	909	1,510	1,016
Germany, West.....	28	14	79	1,135	1,210	596
Netherlands.....	4	20	24	380	534	141
Sweden.....	34	60	170	484	1,980	1,464
Switzerland.....	12	5	63	215	903	485
Other Europe.....	50	42	81	290	106	185
Total Europe...	220	194	593	4,133	7,042	4,263
Bahamas.....	56	57	98	136	169	187
Japan.....	34	44	38	60	62	72
Other countries....	342	274	348	456	458	424
TOTAL.....	3,884	4,470	6,271	11,106	13,186	9,283
Grapefruit:						
Canada.....	1,855	1,880	2,028	2,233	2,344	3,065
Europe						
Belgium-Lux. ....	78	132	90	190	288	114
France.....	311	1,024	402	1,092	889	858
Germany, West.....	37	445	116	503	124	325
United Kingdom....	128	231	29	235	6	5
Other Europe.....	188	260	209	925	617	637
Total Europe...	742	2,092	846	2,945	1,924	1,939
Other countries....	160	214	235	180	204	222
TOTAL.....	2,757	4,186	3,109	5,358	4,472	5,226

Continued . . .



Table 15.--Orange and Grapefruit Products: United States Exports  
by countries of destination, 1963-64 through 1968-69--Continued

Item and Country of Destination	Year beginning November 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>
<u>ORANGE CONCENTRATE</u>						
Frozen:						
Canada.....	2,163	2,400	2,264	2,942	2,804	2,919
Europe						
Germany, West....	21	65	175	335	273	161
Netherlands.....	52	57	83	147	168	166
Sweden.....	76	77	67	113	170	237
Switzerland.....	41	33	42	60	73	66
United Kingdom...	3	57	246	487	441	377
Other Europe.....	10	13	40	133	120	108
Total Europe...	203	302	653	1,275	1,245	1,115
Other countries...	98	105	143	201	177	193
TOTAL.....	2,464	2,807	3,060	4,418	4,226	4,227
Hot-Pack:						
Canada.....	235	162	144	139	122	115
Europe						
Germany, West....	140	105	214	207	142	171
Ireland.....	32	27	37	42	34	34
Netherlands.....	105	78	108	130	121	124
Switzerland.....	33	59	47	61	54	70
Other Europe.....	38	71	40	120	64	71
Total Europe...	348	340	446	560	415	470
Hong Kong.....	50	35	36	38	46	47
Malaysia & Sing. ...	127	125	151	130	102	121
Philippines.....	159	197	43	10	12	5
Other countries.....	46	35	22	81	27	12
TOTAL.....	965	894	842	958	724	770

Continued . . .

Table 15.--Orange and Grapefruit Products: United States Exports  
by countries of destination, 1963-64 through 1968-69--Continued

Item and Country of Destination	Year beginning November 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
ORANGE OIL						
Canada.....	140	223	152	182	93	111
Europe						
Denmark.....	88	81	133	204	120	74
France.....	516	989	715	1,058	372	720
Germany, West.....	413	541	578	495	460	786
Netherlands.....	310	357	450	566	488	587
Spain.....	73	83	169	333	175	347
Switzerland.....	193	252	294	382	433	412
United Kingdom....	403	323	386	669	324	512
Other Europe.....	114	389	175	778	293	406
Total Europe....	2,110	3,015	2,900	4,485	2,665	3,844
Chile.....	89	89	139	123	81	25
Venezuela.....	66	59	112	76	42	51
Japan.....	490	513	740	782	818	626
Other countries....	267	355	409	339	411	395
TOTAL.....	3,162	4,254	4,452	5,987	4,110	5,052
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>
GRAPEFRUIT SECTIONS						
Canada.....	88	47	65	35	61	61
Europe						
Ireland.....	10	9	8	6	2	1
Netherlands.....	2	4	3	3	1	3
United Kingdom....	28	28	33	20	4	2/
Other Europe.....	9	8	6	11	10	6
Total Europe....	49	49	50	40	17	10
Japan.....	2	2	3	2	4	3
Other countries....	8	7	10	6	10	10
TOTAL.....	147	105	128	83	92	84

1/ Equivalent cases of 24 No. 2 cans.

2/ Less than 500 boxes.

Table 16.--Fresh and Processed Citrus: United States Imports (for consumption)  
by countries of origin, 1963-64 through 1968-69

Item and Country of Origin	Year beginning November 1					
	1963-64	1964-65	1965-66	1966-67	1967-68	1968-69
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>boxes</u> <sup>1/</sup>	<u>boxes</u> <sup>1/</sup>	<u>boxes</u> <sup>1/</sup>	<u>boxes</u> <sup>1/</sup>	<u>boxes</u> <sup>1/</sup>	<u>boxes</u> <sup>1/</sup>
<u>ORANGES, FRESH</u>						
Haiti.....	171	5	---	---	---	3/
Israel.....	60	95	149	6	322	331
Japan.....	20	16	11	4	9	24
Mexico.....	1,854	1,266	740	391	1,768	997
Other countries....	19	12	9	9	42	10
TOTAL.....	2,124	1,394	909	410	2,141	1,362
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>gallons</u> <sup>2/</sup>	<u>gallons</u> <sup>2/</sup>	<u>gallons</u> <sup>2/</sup>	<u>gallons</u> <sup>2/</sup>	<u>gallons</u> <sup>2/</sup>	<u>gallons</u> <sup>2/</sup>
<u>ORANGE JUICE, CONCENTRATED</u>						
Argentina.....	1,320	3/	---	50	---	---
Brazil.....	---	3,770	593	2,732	11,062	10,317
Jamaica.....	499	201	18	---	---	114
Mexico.....	3,968	265	23	---	761	129
South Africa.....	95	67	---	---	---	---
Surinam.....	531	---	---	35	19	---
Other countries....	2,208	498	153	38	---	2,131
TOTAL.....	8,621	4,801	787	2,855	11,842	12,691
<u>LEMON JUICE, CONCENTRATED</u>						
Italy.....	930	9	1	23	22	2
Other countries....	34	---	---	---	---	---
TOTAL.....	964	9	1	23	22	2

<sup>1/</sup> Equivalent boxes of 70 pounds.

<sup>2/</sup> Single-strength equivalent.

<sup>3/</sup> Less than 500 gallons.

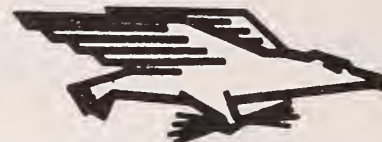
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## THE MARKETING SITUATION FOR WINTER CITRUS IN EUROPE

### SUMMARY

Citrus production is forecast at record levels in the Mediterranean area for the 1969-70 marketing season. The orange crop (including tangerines) is estimated at a record 205.3 million boxes, 10 percent above last year's crop. Grapefruit production is pegged at approximately the same level as the past two seasons, but the output of lemons is expected to register a decline from 1968-69.

Exports of Mediterranean oranges during the 1968-69 winter marketing season reached a new high of 89 million boxes--a 6 percent gain over the previous year. Shipments of lemons in 1968-69 surpassed those of 1967-68 by a narrow margin while grapefruit exports declined for the first time since 1960-61. Reports covering the first portion of the 1969-70 season indicate heavy movement of oranges and possibly a new export record. Grapefruit shipments are also headed for an alltime high. Exports of lemons from some countries for the beginning of the 1969-70 season are well ahead of 1968-69; but Italy--by far the leading exporter--has a smaller lemon crop this season and may ship less fruit than last year.

Fresh citrus exports from the United States during the 1968-69 winter marketing season increased for all three categories: oranges, lemons, and grapefruit. However, most of the gains were registered in markets other than those in Europe.

U.S.-processed citrus products were generally more plentiful in the export market during 1968-69 than in the previous year, except for single-strength orange juice.

Freezing temperatures have reduced the 1969-70 U.S. citrus crop, and the effect of the freeze on total fresh citrus exports is yet to be determined. Despite the problems brought about by the 1969-70 freeze, exports of processed citrus products are expected to surpass 1968-69 levels for most major products.



## U.S. EXPORT OUTLOOK

Fresh citrus.--Freezing weather has affected U.S. citrus production for the second consecutive season, and the full extent of the damage will only become evident as the season progresses. Total production of oranges <sup>1/</sup> for 1969-70 is presently forecast above last year's because of an increase in early, midseason, and navel varieties. Output of Valencias is down from last year's level. Especially noteworthy is the smaller Valencia orange crop forecast in both California and Arizona--important suppliers to off-shore markets. The total 1969-70 U.S. grapefruit output is below 1968-69. Lemons are the most abundant citrus fruit in relation to last year's crop. According to present estimates, production in the three major citrus categories is at a relatively high level by historical standards.

Citrus exports during the 1968-69 winter marketing season improved from the generally poor performance of the previous year. For 1969-70, early season shipments of oranges and grapefruit are both slightly ahead of last season due largely to increased exports to Canada. The movement of lemons is also above last season, primarily because of continued expansion of the Japanese market. Citrus exports are normally heavier the last portion of the winter marketing season when shipments from California increase and competition from Mediterranean countries begins to ease. Past U.S. exports of fresh oranges, grapefruit, and lemons during winter marketing seasons are shown in table 1 at the conclusion of this report.

Processed citrus.--More concentrated and single-strength grapefruit juice was exported in 1968-69 than in 1967-68 as well as more orange juice concentrate; but shipments of single-strength orange juice declined. Generally most of the increase was in exports destined for Canada rather than for the more competitive European market.

U.S. juice yields for 1969-70 have been reduced somewhat because of the freeze, but total production plus the carryin stocks should provide ample supplies of orange juice for both the domestic and export markets. Total supplies of grapefruit juice will apparently be tighter. Processed citrus output in Israel, the major Mediterranean competitor of the United States in Europe, is expected to be below the previous year. However, as the season progresses more of the record fresh orange crop in the Mediterranean area will probably be diverted to the processing sector because supplies appear to be exceeding fresh fruit demand in Europe. In addition, preliminary reports from Brazil indicate more oranges will be available for processing than ever before. But, despite slow initial movement to Canada during the early part of the season, U.S. export prospects for citrus juices in 1969-70, mainly orange juice, appear brighter than last year. Early season shipments to Europe are ahead of last year's pace. Past U.S. exports of the principal citrus juice products are set forth in table 2.

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<sup>1/</sup> Figures cited throughout this report are from unrounded data. The term "oranges" as used in this report includes tangerines unless otherwise indicated.



## THE SITUATION FOR FRESH CITRUS IN COMPETING AREAS

### Production Prospects for 1969-70

Oranges.--A recovery in Spanish output plus larger crops in most other Mediterranean countries should result in record production for 1969-70. The present production forecast for the countries listed in table 3 is 205.3 million boxes--18.4 million more than the preceding season and 11.6 million above the previous record established in 1966-67. Recent poor weather in some countries, notably Morocco, has affected production, but total output should be close to the estimate.

Lemons.--After six consecutive record crops, production in the major Mediterranean countries is forecast at 33.1 million boxes, or 900,000 boxes below 1968-69. Only Italy and Turkey anticipate smaller crops in 1969-70, but these countries are the two largest producers. Despite the decline in output, supplies should be more than ample to meet demand. Production expectations surpass that of any season except 1968-69.

Grapefruit.--The rapid rate of expansion demonstrated by the producers listed in table 3 has subsided, at least for the present. Led by Israel and to a lesser extent Cyprus, these countries have expanded output every year throughout the 1960's with 1968-69 the only exception. Production for 1969-70 is estimated at a record 10.46 million boxes compared with 10.42 last season and 10.44 in 1967-68. A production series for oranges, lemons, and grapefruit in competing areas is shown in table 3.

### Export Prospects for 1969-70

As usual, preseason estimates from almost every Mediterranean country predicted a substantial increase in exports over 1968-69. Supplies are available, and given relatively orderly marketing, gains may be registered in all three citrus categories this season.

Earlier maturing crops have aided exports, and the three major exporting countries (Spain, Israel, and Morocco) all shipped more oranges and tangerines from the autumn of 1969 through February 1970 than during the similar period in 1968-69. The major problem facing exporters for the remainder of the season will be to adjust the amount shipped to avoid the chaotic market conditions that have plagued them in the past. A major determinant of market conditions will be the extent to which trade patterns are disrupted by the European Community.

Up to this point marketing has been reasonably orderly although disappointing prices have been received for some shipments. While exports of oranges and tangerines from the Mediterranean area may not reach the potential indicated by the bumper crop, the total volume is expected to easily surpass the record 89 million boxes exported last season.

Grapefruit exports could also reach record levels in 1969-70. The crop in Israel is earlier and of better quality than last season when heavy rains

reduced both output and quality. Shipments during the first part of the season are well ahead of last year's level for the same period, and the amount processed has fallen. More grapefruit than last season is also expected from Cyprus and the Gaza area.

Output of lemons in both Greece and Spain is expected to rebound from the freeze damage which reduced exports last season. In both countries export increases of 100 percent or more are anticipated. Despite smaller crops in Italy and Turkey, total output is sufficient to allow greater exports than last season.

Citrus exports from countries competing with the United States in European markets are shown in table 4.

EC preferential tariff scheme.--Every season has its marketing problems, which in 1969-70 have been accentuated by the presence of a record citrus crop in the Mediterranean area. But perhaps the most serious development for the United States is the proliferation of preferential trade agreements between the European Community (EC) and a number of major Mediterranean exporters. Preferential treatment is not new, but by 1969 the EC had accorded lower import duties to Algeria, Greece, Israel, Morocco, Spain, Tunisia, and Turkey. The following tabulation sets forth the duties applied by the EC to these countries compared with the full rate applied to citrus from other countries.

<u>Commodity</u>	<u>Period</u>	<u>Rate of duty, ad valorem</u>
<u>Sweet Oranges:</u>		
Greece .....	Jan. 1-Dec. 31 .....	Free <u>1</u> /
Morocco and Tunisia ...	Oct. 16-Mar. 31 .....	4 percent
	April 1-Oct. 15 .....	3 percent
Israel, Spain and Turkey .....	Oct. 16-Mar. 31 .....	12 percent
	April 1-Oct. 15 .....	9 percent
Other countries .....	Oct. 16-Mar. 31 .....	20 percent
	April 1-Oct. 15 .....	15 percent
<u>Tangerines:</u>		
Greece .....	Jan. 1-Dec. 31 .....	Free <u>1</u> /
Morocco and Tunisia ...	Jan. 1-Dec. 31 .....	4 percent
Israel, Spain, and Turkey .....	Jan. 1-Dec. 31 .....	12 percent
Other countries .....	Jan. 1-Dec. 31 .....	20 percent
<u>Lemons:</u>		
Greece .....	Jan. 1-Dec. 31 .....	Free <u>1</u> /
Morocco and Tunisia ...	Jan. 1-Dec. 31 .....	1.6 percent
Israel, Spain, and Turkey .....	Jan. 1-Dec. 31 .....	4.8 percent
Other countries .....	Jan. 1-Dec. 31 .....	8 percent

1/ Free within the framework of an increasing yearly quota.



Citrus from Algeria receives a preference according to importing area: Free in France and the Saar, 50 percent of the full rate in Belgium, Italy, Luxembourg, and the Netherlands. In West Germany Algerian citrus is assessed the full rate.

The tariff reductions cited in the above tabulation (effective September 1, 1969, for Morocco, Tunisia, Israel, Spain, and Turkey) were subject to the stipulation that prices for citrus from these countries as quoted on the EC wholesale markets must be equal to or greater than the reference prices in force during the period concerned, increased by the tariff, plus a lump sum fixed at \$1.20 per 100 kilograms. 2/

Under the rules of international trade as embodied in the General Agreement on Tariffs and Trade (GATT), the extension of lower duties to one country and not to other GATT members is viewed as a violation of the first tenet of GATT. There are exceptions to this rule. One exception provides for the formation of free trade areas or customs unions. These arrangements must cover a substantial part of the trade between the nations and must include a plan and schedule for the formation of the free trade area or customs union within a reasonable length of time.

The EC arrangements with Israel and Spain, in the view of the United States and some other members of GATT, merely extend preferences without presenting formal plans for eventual free trade areas. According to this view, the first article of GATT, which provides that trade should be conducted in a non-discriminatory manner, is being violated. The EC extended the preferences and then asked GATT to waive the Community's obligations to other members and to permit the preferences to stand. Pressure from members of GATT led to the withdrawal of the waiver request in December 1969 and the promise to withdraw the preferences. With the 1969-70 winter citrus season now in full swing, the EC has still not taken this action.

The legality of the agreements with Morocco and Tunisia is also subject to question on the grounds that it does not comply with all requirements as set forth under the GATT rules.

The 1969-70 citrus season is the first time since the establishment of the reference price system several years ago that the EC has used the system to penalize countries for allowing their fruit to be sold too cheaply. The countries affected are: Algeria, Greece, Israel, Spain, and Morocco. For Algerian and Greek citrus, a compensatory tax was levied equal to the difference between the selling price and the specified reference price. The full duty was levied on citrus from Israel, Spain, and Morocco. The duration of higher duties varied for oranges from different countries from a few days to a matter of weeks. Higher duties were applied to most of the popular varieties.

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2/ For more detailed information on the EC reference prices for citrus fruit see Foreign Agricultural Service Circular FCF 1-70, January 1970.



A more encompassing preferential trade agreement is now being negotiated by the EC with both Israel and Spain. In addition to including the original preferences on oranges, tangerines, and lemons, preferences on grapefruit and grapefruit products will probably be put into effect. Some believe the commodity list will eventually be broadened to include juices. Other citrus exporters are seeking similar treatment for their citrus.

It is too early to accurately assess the EC citrus preferences' influence on future citrus trade patterns. However, it is apparent that the levying of a compensatory tax and the revoking of the preferential duty for certain periods has made the Mediterranean countries more cautious this season. On at least two occasions Spain, the largest producer and exporter in the area, has suspended exports of oranges to several countries--including those in the EC. At other times Spain has regulated shipments.

One fact seems certain at this time. Another hurdle has been added to those already faced by the United States and other outsiders exporting to the world's major importer of citrus--the Common Market.

#### Country Descriptions of Fresh Citrus Situations

Cyprus--Preliminary indications for 1969-70 point to a slight increase in citrus production from last season's record output. Small increases in all three categories--oranges, lemons, and grapefruit--have been reported. Within the orange family, the production of Valencias has tripled since 1964-65 while Shamouti output has remained approximately the same. The total production of citrus is, however, limited by the availability of irrigation water. Unless additional supplies are developed, the rate of increase will be less in the coming years.

Exports have expanded along with production and reached a record 146,008 metric tons in 1968-69--23 percent above the 1967-68 level. Valencias accounted for 43 percent of total exports in 1968-69 and registered the largest increase. The United Kingdom received 40 percent of the citrus exports compared with about one-third in 1967-68.

Greece--Production of oranges is expected to set a record of approximately 14.7 million boxes in 1969-70, almost one-third more than the previous season and more than double the freeze-damaged 1966-67 crop. Lemon production is also recovering from the freeze. But despite a 50-percent increase in output this season, the crop is still slightly below the preefreeze level.

New plantings are declining, and by next year they may approximate the uprooting of old trees. According to the Ministry of Agriculture, existing citrus groves (many of them planted in the past few years) are expected to bear more than 700,000 metric tons of fruit by 1972 and eventually 950,000 tons compared with the 1969-70 estimate of about 567,000 metric tons. If market conditions warrant further expansion, an additional 200,000 metric tons could eventually be obtained from new plantings in areas where irrigation projects are currently under construction.



Exports of both sweet oranges and tangerines reached record levels in 1968-69, but lemon exports were only one-half those of a year earlier. Both the relative and absolute levels of citrus exports to EC countries increased due in part to the duty-free quota system for Greek oranges and lemons. During the 1968-69 season, 31 percent of exported oranges, 20 percent of tangerines, and 33 percent of lemons were shipped to EC countries. Most other citrus exports were sent to Eastern Europe.

The 1969-70 budget for advertising programs in foreign markets was increased considerably over last year's and is supported by the Greek Government. In addition, the government directly subsidizes exports; but no information is presently available concerning export subsidies for the 1969-70 crop.

Israel.--The record citrus crop predicted last season did not materialize largely because Shamouti orange production fell short of the original estimates. Grapefruit and lemon output was also below expectations. Prospects for 1969-70 indicate an increase over last season, but at this time only grapefruit production is estimated at a record level--7.4 million boxes. The orange crop is forecast at 29.3 million boxes, or 2 million boxes above the 1968-69 crop. Lemon production is estimated at 1 million boxes, or only slightly more than last year's. Fruit is maturing earlier than normal.

Practically no new plantings were reported in 1967. But in 1968, 247 acres were planted to Shamoutis, 163 acres to Valencias, and 161 acres to grapefruit. The Shamouti plantings were practically all replacements for old groves; but the grapefruit plantings are the beginning of a program to increase production to about 9 million boxes by 1980.

Approximately 62 percent of all citrus produced was exported in 1968-69 which was the same export ratio as for the previous year. Processing accounted for 31 percent of Israel's citrus in 1968-69 compared with 33 percent processed in 1967-68. Fruit consumed within Israel, normally export rejects and culls, rose to 7 percent in 1968-69.

Despite the smaller 1968-69 crop, total revenue increased. Subsidies are paid to the industry based on a certain rate per dollar of export earnings. The 1968-69 season was the first year in which the full export grant of 10 percent on the f.o.b. value was given. In 1967-68 the industry received 7 percent of the export earnings as a premium.

Emphasis continues to be placed on quality in packing and on trial shipments using various containers. For example, new types of cartons are being tested that allow for better ventilation, and trial shipments of unpacked fruit in 750-pound bins for packing at destination are being undertaken.

A total of 716,819 metric tons of citrus were exported during 1968-69 compared to 765,637 the previous year. West Germany (182,558 metric tons) replaced the United Kingdom (164,572 tons) as the major buyer of Israel's citrus. The EC countries received 44 percent of the total exports--a slight decline from 1967-68.



Despite exporting less fruit in total, gains were registered in shipments to France, the Scandinavian countries, and Eastern Europe, especially Yugoslavia. There was also a slight increase in shipments to North America and the Far East, mainly Hong Kong and Singapore. The most important markets receiving less citrus included the United Kingdom, the Netherlands, and West Germany. An attempt to enter the Japanese market failed as Israel could not comply with the requirements of the local health regulations.

Increases in exports of all three categories of citrus are expected in 1969-70 with further emphasis being placed on the markets in North America and the Far East.

Gaza.--Citrus is the single most important economic asset of the Gaza area, which has been under Israeli administration since June 1967. Prior to 1967 most of the citrus was marketed in Egypt or exported to Eastern Europe. Now, however, citrus from this area is becoming more prominent in Western Europe. By the end of the 1967-68 season, two modern packinghouses were operating and the quality of the exported fruit improved significantly. During 1968-69 the Israeli Citrus Marketing Board established a separate company to contract for Gaza fruit, see that grading and packing met Israeli standards, undertake the marketing, and pay the producers. The Citrus Marketing Board hopes to include at least one-half of the Gaza citrus exports in 1969-70 within the framework of this company.

During 1968-69, 70,000 metric tons of citrus were shipped to Europe and the Far East. The 1969-70 crop is expected to be about 10 percent above the 1968-69 output of 102,000 metric tons.

Italy.--The 1969-70 citrus crop is not expected to reach the record level established last season. Sweet orange production is forecast at 44.5 million boxes, only 100,000 less than in 1968-69; but the tangerine crop, 6.6 million boxes, is down almost 1.8 million boxes. The less desirable blood-type oranges comprise about 64 percent of the crop, a substantial increase from the 59 percent recorded last season. Nonbloods, grown mostly on the mainland, suffered from frosts, while weather conditions were favorable in Sicily where blood-type oranges are popular.

The lemon crop is also forecast below last year's record level as the high incidence of fruit drop in Sicily and the frost damage on the mainland reduced the crop to 21.2 million boxes. Production in 1968-69 was 23.4 million. It appears that quality is generally good and sizes more normal than in 1968-69, when they were rather small.

The inability to satisfactorily market Italian citrus has led to various systems of support at all levels. These include "short-term" measures (until 1974) using a subsidy to encourage Italians to ship more oranges and tangerines to EC member states and "medium-term" measures. The latter involve the reconversion of existing orange and tangerine groves to more popular varieties plus the construction of new packing, storage, and processing plants and the modernization of old ones. Also included are plans to adopt better



methods of grading and packaging. Supplementary aid of approximately US\$1,000 and \$1,200 per reconverted hectare (2.471 acres) will be paid to small orange and tangerine growers, respectively, meeting certain conditions. The EC will also pay one-half of the costs incurred in the improvement of packing plants and packing methods and the construction of processing plants and storage facilities. The Italian Government will presumably pay the other half.

Recent EC regulations offer subsidies to Italian orange growers who sell their produce to processors and also to processors who purchase larger quantities than the average used between 1966 and 1969. The amounts of the subsidies depend on a series of conditions and prices.

Approximately 1 million boxes of oranges were purchased by the government during the 1968-69 season, of which 409,000 were donated to institutions and needy families, 535,000 were processed, and the rest either destroyed or dumped into rivers. Most were from Sicily.

Italian export subsidies were increased and expanded in May 1969 to include shipments to all non-EC countries. They were set at 1.52 cents per pound for sweet oranges (1.09 cents from April 1 to October 15), 0.87 cents per pound for mandarins, and 0.65 cents per pound for lemons. Despite the existence of these subsidies, the growers have been complaining about the failure of the government to make the actual payments.

The EC Commission fixed subsidies effective March 1, 1970, at 1.52 cents for sweet oranges, 0.87 cents for mandarins, and 0.65 cents for lemons. They are applicable until May 31, 1970, except for mandarins, for which the subsidy is applicable until March 31, 1970.

Record production and export subsidies helped Italy to post a better-than-20-percent increase in exports of sweet oranges and tangerines in 1968-69. The latter showed the most improvement. More than twice as many tangerines (1.1 million boxes) were exported in 1968-69 compared with the poor 1967-68 season. Shipments of lemons through August 1969 were already 12 percent above the total for the previous season. West Germany is the major recipient of Italian citrus. Other important customers are Switzerland, East Germany, and Austria for oranges and the USSR, France, and Poland for lemons. Market promotion activities are far below those of the other major countries participating in the European market.

Japan.--The Satsuma orange crop was forecast early in the season at 70.9 million boxes, 4 percent below the record 1968-69 output. About 80 percent of the crop is marketed fresh. The record output of 1968-69--47 percent above that of the previous year--presented some problems for the industry. Prices were low with the average wholesale price in December 1968 reportedly the lowest in the decade. Only 55 percent of the total area planted to Satsumas is now in a bearing status, and therefore tremendous increases are anticipated. It is obvious that new outlets will have to be found if the crop reaches the size expected in the future. In addition, assistance from the government is apparently planned for all levels of the industry.



Exports increased 24 percent in 1968-69 but remain relatively insignificant--only 750,000 boxes. Canada received 65 percent of Japan's Satsuma exports and most of the remainder was sent to the Ryuku Islands. About 21,000 boxes were shipped to the United States. The 1969-70 target for exports to the United States for the five States into which imports are allowed (Alaska, Washington, Oregon, Montana, and Idaho) is around 25,000 boxes.

Morocco--A record citrus crop and above-average quality are expected by Morocco in 1969-70. First production forecasts indicated a sweet orange crop of 22.9 million boxes, nearly 4 million more than the previous year. This figure included about 10.5 million boxes of Valencia lates and 5.9 million boxes of navels. The output of tangerines was estimated at 4.7 million boxes, 1 million more than in 1968-69. Forecasts for lemon production, 98,975 boxes, and grapefruit output, 215,913 boxes, are well below previous years' crops. Earlier than normal harvests have been experienced.

However, heavy rains and floods in January 1970 apparently caused severe damage in some areas. Approximately 12,400 acres were affected to various degrees with an estimated loss of 60,000 metric tons of citrus, virtually all oranges.

Prior to 1969-70 the Office of Commercialization and Exportation (OCE), the government organization formed when the export sector was nationalized in 1965, actually purchased citrus from producers at guaranteed prices and sold for its own account. Beginning with the current season the OCE will sell for the producer's account.

Under the previous system the OCE established price levels, and a portion of the price was advanced to the producer during the season with additional payments made at the end. However, administrative costs were excessive, and the system never gained support of the producers. Under the current system producers will be paid advances in amounts up to 40 percent of a hypothetical price with rebates at the end of the season based on profits remaining after deducting the OCE's operating expenses. The principal difference is that in its new role the OCE should be able to cut costs, especially in the area of management and administration. In addition, producers believe citrus price levels on international markets will be more directly reflected in prices received in Morocco.

Total exports declined in 1968-69. But as usual France led the list of market countries and took 38 percent of the sweet orange exports and 58 percent of the tangerines. The USSR was the second-ranking market and took 27 percent of the orange exports. France was also the major market for both lemons and grapefruit. At the time of the French devaluation, outstanding payments were sizable and resulted in a loss to the OCE.

Spain--Following two seasons of production declines, the Spanish crop for 1969-70 is expected to register a sizable increase. Excellent quality and normal sizes are reported. Total sweet orange production should reach 56.6 million boxes compared with 47.6 million in 1968-69. Navels comprise 41 percent of this season's crop and have the largest increase from last season.



Tangerine output is estimated at 9.3 million boxes, or 2.3 million more than in 1968-69. Larger crops of lemons and grapefruit are also anticipated.

New plantings are reported for most major citrus varieties, and work to improve cultural practices continues. In November 1968 the first stage of a four-stage project to build an aqueduct linking the reservoirs at Bolarque (Cuenca) and Talave (Albacete) was approved. About 355,650 acres will be irrigated. The economic study conducted by the government envisions the planting of about 62,600 acres to oranges and tangerines and 8,500 acres to lemons. Substantial acreage planted to young trees plus improvements in the use of fertilizers, pesticides, and irrigation indicate substantial potential for the future. However, Spain's vulnerability to damaging freezes plus the existence of tristeza cast a major element of uncertainty into projections for the future.

Citrus exports from Spain totaled 1,128,000 metric tons in 1968-69--a 7-percent quantity improvement from the previous year. The proportion of reported production exported in 1968-69 was 62 percent compared with 49 percent in 1967-68. The EC countries received about three-quarters of the 923,000 tons of sweet oranges exported in 1968-69 and more than 80 percent of the tangerines, lemons, and grapefruit. With a larger citrus crop presently available, increases are anticipated in all categories.

Trinidad and Tobago--Citrus production during the 1968-69 season was the smallest since the 1950's, and prospects for 1969-70 are only slightly brighter. Heavy rains during the period of bloom plus poor cultural practices were blamed for the small crop in 1968-69. However, the citrus industry has been declining throughout the 1960's and despite efforts by the government to change the trend, no tangible results are evident. New research projects have recently been initiated, but their effect on the industry is yet to be determined.

Production of grapefruit is projected at 450,000 boxes for 1969-70--about the same as last season but only one-half the output in 1964-65. Orange production is forecast at 357,000 boxes, or 12 percent above 1968-69. The small grapefruit crops coupled with poor quality and increased competition have drastically cut fresh grapefruit exports from 149,333 boxes in 1965-66 to 41,410 boxes in 1968-69.

Turkey--Despite a serious flood in the Mersin area last season during which many thousands of trees were reportedly destroyed, citrus production, according to official statistics, set a new record. Lemon production jumped to 3.8 million boxes from 2.6 in 1967-68 while the sweet orange crop reached 15 million boxes compared with 12 million in 1967-68. Estimates for 1969-70 indicate a crop of 3.3 million boxes of lemons and 12.6 million boxes of sweet oranges. The tangerine crop for 1969-70 is forecast at 1.6 million boxes--down 11 percent from last season.

Turkey is becoming a more important factor on the international citrus market--especially for lemons and tangerines. The rate of increase in exports and the prices received have encouraged Turkish producers to increase production and improve marketing procedures. Turkish fruit has the inherent advantage of



maturing earlier than in most other countries. Production of certain varieties is encouraged by the government's providing credit, supplying trees and machinery and plant protection materials, and organizing marketing facilities. However, marketing facilities in Turkey lag behind those of most other major producers at the present time for fruit sold both within the country and in the export market. Nevertheless, packinghouses are being constructed, grades established, and more modern transportation developed.

Over the past five seasons (1964-65 through 1968-69) exports of lemons have increased from about 100,000 boxes to more than 800,000 boxes, and tangerine exports have climbed from about 100,000 boxes to 555,300 boxes. Exports of oranges remain relatively insignificant compared to production--only 550,000 boxes in 1968-69, which went chiefly to the U.S.S.R.

The fruit and vegetable industries are receiving special attention from the Turkish Government in order to foster increasing exports. Tax rebates are being utilized in this effort.

#### THE SITUATION FOR CITRUS PROCESSING IN COMPETING AREAS

##### Utilization Patterns and Prospects

The processing industries in the major countries of the Mediterranean area, as represented in the following table, absorbed more citrus during the 1968-69 season than during the previous year. A major factor behind this increase was the inability on the part of Italy, because of its record crop, to satisfactorily market sufficient quantities of oranges in the fresh form. On the other hand, Israel registered a drop in processing activity in 1968-69 because of a smaller crop and fewer culls. The net result for the area was a 5-percent increase in the amount of oranges and tangerines processed despite lower fresh fruit production. The quantity of grapefruit processed also rose, but that of lemons remained about the same.

Despite larger crops in most countries, less fruit has been processed in 1969-70, especially in Israel, the Mediterranean's major exporter of citrus juices. Exports of fresh citrus have been running ahead of last year's performance to this date, but as the season progresses some countries are likely to encounter marketing difficulties. If marketing problems do occur, a larger portion of the crop will probably find its way into the processing sector than is presently indicated. At this time it appears that less processed citrus will be available in the 1969-70 season than in 1968-69.



The following table shows the approximate tonnages utilized by the major Mediterranean countries during the past two seasons in comparison with those used by the United States.

Variety and country	1967-68			1968-69 1/		
	Percent			Percent		
	Production	Processed	processed	Production	Processed	processed
	1,000 metric tons	1,000 metric tons	Percent	1,000 metric tons	1,000 metric tons	Percent
Oranges & tangerines:						
Greece ....	209.8	41.0	20	354.7	86.0	24
Israel ....	950.0	305.0	32	866.0	241.5	28
Italy .....	1,432.7	366.0	26	1,676.7	425.0	25
Morocco ...	776.2	65.0	8	719.8	67.0	9
Spain .....	2,076.0	207.0	10	1,731.4	211.4	12
Total .....	5,445.1	984.0	18	5,348.6	1,030.9	19
U.S. ....	5,263.6	3,791.2	72	7,502.5	5,621.9	75
Lemons:						
Greece ....	93.1	18.0	19	68.2	13.5	20
Israel ....	40.1	14.1	35	32.6	10.5	32
Italy .....	657.3	150.0	23	806.4	160.0	20
Spain .....	111.6	8.0	7	79.7	6.0	8
Total .....	902.1	190.1	21	986.9	190.0	19
U.S. ....	581.5	256.7	44	546.1	235.9	43
Grapefruit:						
Israel ....	265.8	101.4	38	262.2	108.7	41
Spain .....	6.4	2.0	31	6.5	2.2	34
Total .....	272.2	103.4	38	268.7	110.9	41
U.S. ....	1,615.7	811.9	50	2,001.3	1,180.3	59

1/ Preliminary estimate.

#### Country Descriptions of Processed Citrus Situations

Greece.--The amount of citrus entering the processing sector during the 1968-69 season increased 54 percent from 1967-68 to 98,500 metric tons. However, this was below the tonnage processed in 1966-67. Approximately 31,500 metric tons of orange juice (single-strength equivalent) were produced in 1968-69 compared with only 19,470 in 1967-68 but 38,500 tons in 1966-67. Lemon juice production was reportedly 3,875 tons in 1968-69 versus 4,260 tons in 1967-68.

Greece's first plant to process frozen concentrate is being constructed in Crete with the output destined largely for the export market. A modern co-operative processing plant was established in Sparta in 1968, making total capacity of existing plants about 200,000 metric tons. There appear to be no



plans for further expansion. Subsidies are paid for citrus delivered to processors, but no government assistance in marketing citrus juices and no major efforts to develop new markets or expand old ones are reported at the present time.

Israel.--Processors utilized almost the same portion of total production in 1968-69 as the previous season, but because of the smaller crop quantity was down 14 percent to only 360,695 metric tons. Although citrus processing is one of the major food processing industries in Israel, no detailed production statistics are available. According to trade sources, the substantial quantity of culls in 1967-68 resulted in a large increase in the pack for that season and a larger than normal carryover into 1969--perhaps as much as 20 percent of the annual production. Normally, more than 90 percent of production is exported. However, the smaller pack last season and higher prices in the export market enabled the processors to reduce the carryover from the 1968-69 crop to a minimum.

Export performance during Israel's 1968-69 fiscal year continued the previous upward trend despite the smaller quantity of fruit processed. Export statistics for some of the processed items are shown on a fiscal year basis in the following tabulation:

<u>Commodity</u>	<u>1966-67</u> <u>Metric tons</u>	<u>1967-68</u> <u>Metric tons</u>	<u>1968-69</u> <u>Metric tons</u>
Grapefruit segments.....	9,464	13,326	15,427
Natural orange juice (unsweetened)...	15,423	20,561	29,900
Natural grapefruit juice (unsweetened)	10,642	14,991	17,722
Conc. orange juice (unsweetened).....	4,365	6,123	9,296
Conc. grapefruit juice (unsweetened).	298	724	798
Frozen concentrated orange juice.....	418	611	1/1,174
Frozen concentrated grapefruit juice.	369	612	1/ 380
Orange juice, sugar added up to 5%...	5,988	8,945	12,098
Grapefruit juice, sugar added up to 5%.	5,785	7,906	10,214

1/ July-January.

Italy.--Two features characterize the Italian processing industry; first, the large number of small processors (about 800) and second, most of the citrus juice is purchased by the Italian soft drink industry. Hot pack and frozen orange juice concentrates produced in Italy are sold mainly in the export market. These products account for only a small share of the overall production although the growing domestic market and the preferences received from the EC should stimulate output. Modernization is already being undertaken by some processing plants.

The production of lemon juice is closely related to the market for lemon oil as well as to the crop level. Output from this season's crop is expected to be down somewhat.

(Text continued on page 20)



Table 1.--United States exports of fresh citrus fruits  
by area of destination, winter marketing season,  
1959-60 to 1968-69 1/

Item and season	Europe							
	Canada	United Kingdom	Common Market 2/	Scandinavia 3/	Other	Total	Other	Total
	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/	1,000 boxes 4/
Oranges:								
1959-60.....	2,827	3	73	40	5	121	690	3,638
1960-61.....	1,967	2	27	40	---	69	398	2,434
1961-62.....	2,115	5	62	5	4	76	406	2,597
1962-63.....	1,610	8	17	1	121	147	326	2,083
1963-64.....	2,404	1	41	45	1	88	596	3,088
1964-65.....	2,153	25	172	62	2	261	408	2,822
1965-66.....	2,692	51	379	110	163	703	831	4,226
1966-67.....	3,053	68	280	85	446	879	632	4,564
1967-68.....	2,199	1	7	3	1	12	471	2,682
1968-69.....	2,726	15	402	25	7	449	737	3,912
Lemons: 5/								
1959-60.....	186	100	618	87	40	845	85	1,116
1960-61.....	191	101	587	90	24	802	89	1,082
1961-62.....	195	114	689	79	15	897	112	1,204
1962-63.....	204	31	259	58	5	353	111	668
1963-64.....	206	23	386	88	4	501	136	843
1964-65.....	201	14	213	71	5	303	258	762
1965-66.....	200	36	582	119	5	742	410	1,352
1966-67.....	211	23	531	104	4	662	475	1,348
1967-68.....	208	17	353	130	3	503	610	1,321
1968-69.....	242	15	392	110	2	519	620	1,381
Grapefruit:								
1959-60.....	1,211	33	213	36	17	299	20	1,530
1960-61.....	1,232	79	293	40	9	421	30	1,683
1961-62.....	1,343	89	424	57	7	577	22	1,942
1962-63.....	1,029	18	335	31	7	391	15	1,435
1963-64.....	1,179	17	291	58	6	372	26	1,577
1964-65.....	1,198	15	342	60	8	425	21	1,644
1965-66.....	1,347	12	342	84	6	444	23	1,814
1966-67.....	1,881	21	362	48	18	449	25	2,355
1967-68.....	1,442	3	254	52	2	311	29	1,782
1968-69.....	1,885	8	211	26	2	247	37	2,169

1/ Winter marketing season: oranges and lemons, November 1 - April 30; grapefruit, September 1 - April 30,

2/ Belgium, France, Italy, Luxembourg, Netherlands, and West Germany.

3/ Denmark, Finland, Norway, and Sweden.

4/ Box weights: oranges, 70 pounds; lemons, 76 pounds; grapefruit, 80 pounds.

5/ Including limes.

Foreign Agricultural Service. Compiled from reports of the U.S. Department of Commerce.

Table 2.--United States exports of citrus fruit juice  
by areas of destination, seasons 1959-60 to 1968-69 <sup>1/</sup>

Item and season	Canada	Europe					Other	Total
		United Kingdom	Common Market 2/	Scandi- navia 3/	Other	Total		
	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons
<u>Single-Strength Juice</u>								
Orange:								
1959-60.....	7,694	293	456	467	121	1,337	644	9,675
1960-61.....	5,555	59	185	196	45	485	507	6,547
1961-62.....	6,225	132	1,193	534	114	1,973	672	8,870
1962-63.....	5,235	100	456	176	47	779	404	6,418
1963-64.....	3,232	5	137	61	17	220	432	3,884
1964-65.....	3,901	7	79	92	16	194	375	4,470
1965-66.....	5,194	10	237	245	101	593	484	6,271
1966-67.....	6,321	198	2,589	1,085	261	4,133	652	11,106
1967-68.....	5,455	29	3,740	2,338	934	7,041	690	13,186
1968-69.....	4,337	14	2,034	1,613	602	4,263	683	9,283
Grapefruit:								
1959-60.....	3,305	255	749	160	102	1,266	156	4,727
1960-61.....	3,302	594	1,663	141	97	2,495	202	5,999
1961-62.....	3,266	960	2,527	199	168	3,854	240	7,360
1962-63.....	2,883	560	1,770	127	132	2,589	159	5,631
1963-64.....	1,855	128	490	53	71	742	160	2,757
1964-65.....	1,880	231	1,692	106	63	2,092	214	4,186
1965-66.....	2,028	29	668	90	59	846	235	3,109
1966-67.....	2,233	235	1,968	184	558	2,945	180	5,358
1967-68.....	2,344	6	1,476	195	247	1,924	204	4,472
1968-69.....	3,066	5	1,524	97	313	1,939	221	5,226
<u>Orange Concentrate</u>								
Hot Pack:								
1959-60.....	159	135	335	66	37	573	69	801
1960-61.....	234	---	447	67	41	555	214	1,003
1961-62.....	176	---	494	59	65	618	354	1,148
1962-63.....	200	---	384	30	55	469	313	982
1963-64.....	235	---	254	24	70	348	382	965
1964-65.....	162	---	203	33	104	340	392	894
1965-66.....	144	---	336	21	89	446	252	842
1966-67.....	139	---	362	81	117	560	259	958
1967-68.....	122	---	278	39	98	415	187	724
1968-69.....	115	---	315	42	113	470	185	770

See footnotes at end of table.



Table 2.--United States exports of citrus fruit juices  
by areas of destination, seasons 1959-60 to 1968-69 1/--Continued

Item and season	Canada	Europe					Other	Total
		United Kingdom	Common Market 2/	Scandinavia 3/	Other	Total		
	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons	1,000 gallons
<u>Orange Concentrate</u>								
Frozen:								
1959-60.....	3,674	1	608	129	28	766	155	4,595
1960-61.....	3,364	5	628	42	26	701	137	4,202
1961-62.....	3,918	3	714	84	64	865	122	4,905
1962-63.....	2,741	---	628	68	65	761	100	3,602
1963-64.....	2,163	3	80	79	41	203	98	2,464
1964-65.....	2,400	57	132	80	33	302	105	2,807
1965-66.....	2,264	246	291	74	42	653	143	3,060
1966-67.....	2,942	487	573	122	93	1,275	201	4,418
1967-68.....	2,804	440	533	191	81	1,245	177	4,226
1968-69.....	2,919	377	379	248	111	1,115	193	4,227
<u>Grapefruit Concentrate</u>								
Hot Pack:								
1959-60.....	10	1	26	15	34	76	59	145
1960-61.....	42	---	49	16	18	83	147	272
1961-62.....	19	3	37	22	52	114	40	173
1962-63.....	6	2	56	22	28	108	24	138
1963-64.....	18	1	21	33	85	140	27	185
1964-65.....	48	2	46	26	34	108	36	192
1965-66.....	24	2	40	8	74	124	17	165
1966-67.....	11	1	27	15	81	124	18	153
1967-68.....	24	---	26	29	92	147	17	188
1968-69.....	55	---	38	13	93	144	7	206
Frozen:								
1959-60.....	108	---	4	6	2	12	14	134
1960-61.....	139	2	9	6	---	17	37	193
1961-62.....	147	---	78	13	2	93	24	264
1962-63.....	164	---	4	3	1	8	21	193
1963-64.....	157	---	8	1	2	11	13	181
1964-65.....	155	2	6	---	3	11	35	201
1965-66.....	183	---	6	1	2	9	59	251
1966-67.....	207	3	9	2	3	17	60	284
1967-68.....	225	70	4	---	5	79	51	355
1968-69.....	429	61	38	10	37	146	153	728

1/ November 1 - October 31.

2/ Belgium, France, Italy, Luxembourg, Netherlands, and West Germany.

3/ Denmark, Finland, Norway, and Sweden.

Foreign Agricultural Service. Compiled from reports of the U.S. Department of Commerce.

Table 3.--Production of citrus fruits in principal countries  
competing with the United States in Europe,  
seasons 1965-66 to 1969-70

Variety and country	1965-66	1966-67	1967-68	1968-69	Estimated 1969-70
	Million boxes 1/	Million boxes 1/	Million boxes 1/	Million boxes 1/	Million boxes 1/
<b>Oranges and tangerines:</b>					
Algeria.....	12.0	12.0	11.8	12.9	13.2
Cyprus.....	1.8	2.5	2.7	3.5	3.6
Greece.....	10.0	12.8	6.6	11.2	14.7
Israel.....	20.8	25.1	29.9	27.3	29.3
Italy.....	37.0	43.1	45.1	52.8	51.1
Morocco.....	18.8	21.3	24.4	22.7	25.7
Spain.....	58.9	73.9	65.4	54.5	65.9
Tunisia.....	2.4	3.0	1.6	2.0	1.8
<b>Total, 8 countries.....</b>	<b>161.7</b>	<b>193.7</b>	<b>187.5</b>	<b>186.9</b>	<b>205.3</b>
<b>Lemons:</b>					
Algeria.....	.4	.4	.4	.5	.5
Cyprus.....	.3	.5	.6	.7	.7
Greece.....	2.8	3.1	2.7	2.0	3.0
Israel.....	1.0	1.2	1.2	.9	1.0
Italy:					
Winter.....	14.3	15.4	15.5	19.0	17.7
Summer.....	1.9	2.1	3.6	4.4	3.5
<b>Total, Italy.....</b>	<b>16.2</b>	<b>17.5</b>	<b>19.1</b>	<b>23.4</b>	<b>21.2</b>
Morocco.....	.3	.3	.1	.1	.1
Spain.....	2.7	2.7	3.2	2.3	3.0
Tunisia.....	.4	.4	.3	.3	.3
Turkey.....	2.3	2.5	2.6	3.8	3.3
<b>Total, 9 countries.....</b>	<b>26.4</b>	<b>28.6</b>	<b>30.2</b>	<b>34.0</b>	<b>33.1</b>
<b>Grapefruit:</b>					
Algeria.....	.13	.12	.13	.14	.14
British Honduras.....	.25	.24	.23	.28	.20
Cyprus.....	.67	.92	.99	1.17	1.23
Israel.....	5.10	6.12	7.33	7.23	7.44
Jamaica.....	.72	.54	.68	.62	.59
Morocco.....	.44	.48	.41	.35	.22
Spain.....	.18	.19	.17	.18	.19
Trinidad and Tobago.....	.80	.66	.50	.45	.45
<b>Total, 8 countries.....</b>	<b>8.29</b>	<b>9.27</b>	<b>10.44</b>	<b>10.42</b>	<b>10.46</b>

1/ Weight of boxes: Oranges, 70 pounds; lemons, 76 pounds; grapefruit, 80 pounds.  
Foreign Agricultural Service. Prepared or estimated on the basis of official  
statistics of foreign governments, other foreign source materials, reports of U.S.  
agricultural attaches and foreign service officers, results of office research, and  
related information.



Table 4.--Exports of citrus fruits to Europe, from principal countries competing with the United States, winter seasons 1964-65 to 1968-69 <sup>1/</sup>

Variety and country of origin	1964-65	1965-66	1966-67	1967-68	1968-69
	Million	Million	Million	Million	Million
	boxes <sup>2/</sup>	boxes <sup>2/</sup>	boxes <sup>2/</sup>	boxes <sup>2/</sup>	boxes <sup>2/</sup>
Oranges and tangerines:					
Algeria.....	6.6	6.1	4.4	4.5	5.6
Cyprus.....	1.6	1.5	1.8	2.2	2.8
Greece.....	2.8	2.8	2.9	2.5	4.1
Israel.....	13.3	14.0	16.4	17.9	17.3
Italy.....	7.1	4.8	5.8	5.3	6.5
Morocco.....	13.2	13.8	16.1	18.9	16.7
Spain.....	34.0	40.0	39.0	32.0	34.9
Tunisia.....	1.3	1.0	1.4	0.8	1.1
Total, 8 countries.....	79.9	84.0	87.8	84.1	89.0
Lemons:					
Cyprus.....	.2	.2	.3	.5	.6
Greece.....	1.4	1.2	1.8	1.2	.7
Israel.....	.3	.5	.5	.6	.4
Italy:					
Winter.....	7.8	7.6	6.8	7.7	8.7
Summer <sup>3/</sup> .....	1.7	2.5	2.2	2.2	2.4
Total, Italy.....	9.5	10.1	9.0	9.9	11.1
Morocco.....	<sup>5/</sup>	.1	.1	.1	<sup>5/</sup>
Spain <sup>4/</sup> .....	1.3	1.2	1.2	.9	.5
Tunisia.....	.2	.2	.2	.1	.1
Turkey.....	.1	.3	.5	.7	.8
Total, 8 countries.....	13.0	13.8	13.6	14.0	14.2
Grapefruit:					
Algeria.....	.04	.06	.03	.04	.02
Cyprus.....	.49	.56	.74	.81	.93
Israel.....	2.46	2.97	3.51	4.29	3.95
Jamaica.....	.06	.08	.05	.05	.05
Morocco.....	.13	.14	.12	.08	.03
Spain.....	.09	.09	.09	.08	.08
Trinidad and Tobago.....	.10	.15	.13	.06	.04
Total, 7 countries.....	3.37	4.05	4.67	5.41	5.10

<sup>1/</sup> Includes exports to the U.S.S.R.

<sup>2/</sup> Weight of boxes in pounds: oranges, 70; lemons, 76; grapefruit, 80.

<sup>3/</sup> June-September. Data for 1968-69 season available only for June-August.  
(Includes an unknown quantity of winter lemons.)

<sup>4/</sup> Includes an unknown quantity of summer lemons.

<sup>5/</sup> Negligible.

Foreign Agricultural Service.



Export rebates were increased in May 1969 for exports of orange juice and lemon juice to all non-EC countries. For orange juice the amount was set at 4.4 cents per pound (based on a 6-to-1 concentration). The subsidy for lemon juice was increased to 1.3 cents per pound (based on a 4-to-1 concentration). Both amounts are adjusted for other concentrations.

Export statistics are not available for the entire 1968-69 season, but from November 1968 through July 1969 shipments of orange juice were 12,000 metric tons and of lemon juice 14,400 tons. Shipments of both were greater than for the entire previous season.

Jamaica.--The decline in production during 1968-69 combined with the increase in domestic fresh fruit consumption left less citrus for processing than during the previous season. Approximately 571,000 boxes of grapefruit and 617,800 boxes of oranges were delivered to processors. Exports of citrus products, mainly to the United Kingdom, have dropped substantially over the past few years. Shipments of canned fruit, almost all grapefruit sections, fell from 11,341 metric tons in 1965 to 7,761 tons in 1968. Fruit juice exports during the same time period dropped from almost 3 million gallons to under 1.8 million.

Japan.--Canned Satsuma orange production, the chief item in Japan's annual fruit pack, totaled approximately 11.4 million cases (equivalent 48/11 oz. cans) during 1968-69. This included 4.7 million cases for export--predominantly to the United States, the United Kingdom, and West Germany--and 6.7 million cases for the domestic market. Early in the 1969-70 season the processing industry estimated the 1969-70 pack at a record 12.5 million cases. Of this amount 5.5 million cases had been set as an export target by the Japan Canned Satsuma Industry Association. Recent reports indicate exports will be closer to 4 million cases.

As a measure to maintain the healthy growth of the domestic orange industry, the Ministry of Agriculture and Forestry (MAF) is recommending that the industry expand production and promote consumption of processed orange (Satsuma) products--especially concentrated juices. If funds can be obtained, the MAF is reportedly planning to grant subsidies to producer cooperatives equal to one-third of the establishment cost for 10 juice concentrating plants. These plants would each have a capacity of 10,000 tons per year. Private firms are also planning to construct processing facilities. Thus, the domestic production of natural citrus juices is expected to expand considerably in the coming years.

Spain.--At the present time some 60 companies are engaged in citrus fruit processing and about 75 percent of them are located in the Valencia area. The trend is toward a greater degree of concentration with the construction of plants capable of utilizing 10,000 to 20,000 metric tons of fresh fruit annually. One plant was recently built to process 50,000 tons during a 110-day season. Combined capacity is between 350,000 and 450,000 metric tons although utilization of citrus was approximately 220,000 tons the past two seasons.



Output of citrus juices, predominantly orange juice, was estimated at a record 34,300 tons during the 1968-69 season, or 8 percent above the year earlier. It is believed that concentrated products were 60 to 70 percent of the total.

Substantial expansion of foreign markets for Spanish citrus products is viewed pessimistically by the trade. Despite Spain's dominant role as a supplier of fresh oranges to Europe, Spanish orange juice has not been as successful. Processing, operating at half its capacity, is still considered a marginal industry needed to absorb fruit that cannot be marketed in the fresh form. The relatively high price of fruit for processing is considered to be the major deterrent to future expansion, and, in the opinion of the processing industry, only by government subsidization can Spain compete with other major processors. Subsidization has been discussed at various levels but so far no action has been taken.

Trinidad and Tobago.--Poor quality and low prices for fresh fruit in 1968-69 resulted in the processing of 394,761 boxes of grapefruit, 89 percent of the crop, and 310,774 boxes of oranges, 98 percent of the crop. Output was estimated at 1 million gallons of grapefruit juice (6 percent less than 1967-68), 1.2 million gallons of orange juice (5 percent more than in 1967-68), and 153,693 cases (24/A2's) of grapefruit sections (a 10 percent increase).

The increasingly competitive European market coupled with short crops has reduced the amount of citrus products exported to Europe. The domestic market is consuming a larger portion of the production and more is being sent to other markets in the Caribbean area.

Turkey.--An organized citrus processing industry has been virtually non-existent until recently. With the emergence of Turkey as a more commercial producer and exporter of citrus, the need for an outlet for excess and poor quality fruit has stimulated the beginning of a processing industry. Construction of three plants has been completed and they are expected to start operating this season. Two of the plants are located in Adana, each with a capacity of 20,000 metric tons, and the third, with a capacity of 500 tons, is located in Antalya.

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## EC ESTABLISHES REFERENCE PRICES FOR FRESH CITRUS, 1969-70 SEASON

Reference prices for fresh citrus fruit marketed in member countries of the European Community (EC) during the 1969-70 season have been established by the EC Commission. These prices, designed as protective measures for Italian producers, provide a means whereby a compensatory tax can be levied on EC imports from third countries in the event the entry prices for such imports fall below the applicable reference price. They have been established annually by the European Community since 1962.

Reference prices for fresh oranges and lemons are set forth in this circular. Such prices are not established for grapefruit since production in the EC is of no commercial significance.

Oranges.--The reference price for varietal Group II oranges (which includes most U.S. varieties) of quality class I imported into the EC from January 1, 1970, to April 30, 1970, is approximately  $\frac{1}{2}$  cent per pound below the price of a year earlier. However, the coefficient applied to the market prices of Group II oranges in the calculation of entry prices, explained on page 3 of this circular, was reduced from 1.10 to 1.0. As a result of the reduction of this coefficient to unity, the market prices of Group II oranges will not be adjusted upward as in previous years, offsetting the decrease in the reference price.

U.S. exports of oranges to EC countries are not expected to be affected by the reference prices. Most of these exports are confined to the May-September period when the minimum price system is not in effect. U.S. participation is generally very limited during the winter months because of the normally abundant Mediterranean supplies.

The 1969-70 reference prices for oranges of quality class I are as follows:

<u>Varietal group</u> <u>(Italian oranges)</u>	<u>Reference price</u> <u>Unit of account</u> <u>per 100 kg. net 1/</u>	<u>Period of</u> <u>application</u>
I - Moro & Tarocco	19.5	December 1, 1969, to March 31, 1970
II - Sanguinello	15.9	January 1, 1970, to April 30, 1970
III - Biondo Commune	6.6	December 1, 1969, to April 30, 1970

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1/ A unit of account is equal to approximately US\$1.

Expressed in equivalent U.S. cents per pound, the 1969-70 reference prices, compared with those of last season, are:

	<u>1968-69</u> U.S. cents per lb.	<u>1969-70</u> U.S. cents per lb.
Group I	8.845	8.845
Group II	7.757	7.212
Group III	3.221	2.994

In order to establish varietal comparability, the EC has determined that the above three groups of Italian oranges correspond to the following varieties imported from third countries:

- Group I - a. Moro and Tarocco
  - b. Those varieties of Group II marketed during the month of December
- Group II - Navel sanguina (Double fine amelioree, Washington sanguina, Sanguina grande) Maltaise sanguine, and all other varieties not listed in Groups I and III.
- Group III - All varieties from Surinam, Biondo cummune (Blanca comuna, Comune), Grano de Oro (Imperial, Sucrena), Baladi, Pera, Macetera, Pineapple, Blood Oval (Doblefina, Double fine), Portugaise sanguine, Sanguina redonda (Entrefina), and Sanguina ordinaire.



The determination as to whether a compensatory tax should be levied on imports of these varietal groups from third countries is made by comparing the entry prices for such imports with the applicable reference price. Before this comparison can be made, the prices of the imported produce, which are compiled at the wholesale level, must be translated back to the port of entry, the point at which the reference price is established. The first step in this procedure involves the multiplication of the actual market prices by prescribed coefficients. The application of these coefficients is to establish comparability in the commercial value of Italian oranges, the prices of which form the basis for the reference prices, and the imported produce. The coefficients applicable to each of the third country varietal groups during the 1969-70 season compared with those of last season are as follows:

	<u>1968-69</u>	<u>1969-70</u>
Group Ia	1.00	1.00
Group Ib	1.24	1.20
Group II	1.10	1.00
Group III	0.76	0.76

The reduction of the coefficient for Group II oranges to unity implies that the EC Commission now views such oranges as being comparable in commercial value to Italian oranges of the Sanguinello variety. The establishment of a coefficient greater than unity, such as for Group Ib oranges, implies that the third country varieties are considered of inferior commercial value compared to the corresponding Italian varieties.

After the market price of the imported produce has been multiplied by the applicable coefficient, charges incurred between the port of entry and the marketplace--import duty, internal transportation costs, etc.--are then deducted from the adjusted market price. The resulting figure, the net entry price, is then in a position to be compared with the reference price. If the net entry price is below the reference price, a compensatory tax--equal to the difference between the two prices--is applied.

As noted on page 2 of this circular, the reference prices are established for oranges of quality class I. Entry prices are calculated for imports corresponding to the same quality class. In the event the market quotations used to derive these entry prices are for imported oranges of quality class II, a correction coefficient must be applied to establish comparability with the value of class I oranges. This coefficient has been set by the EC Commission at 1.33.

Lemons.--The reference price determinations for lemons are much less complex than those of oranges. No adjustments are made for varietal differences between Italian and imported lemons.

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## CITRUS FCF 1-70

The price determinations for lemons of quality class I, shown on the following page, are higher in 8 of the 12 months in the 1969-70 season compared with those established in 1968-69. The largest increase, of close to 1 cent per pound, occurs in May 1970. Despite the generally higher price level, the reference prices remain below the prices at which U.S. lemons may be expected to be delivered in EC markets.

The following tabulation sets forth the reference price for lemons of quality class I for the 1969-70 season and those of last season for comparison:

<u>Month</u>	<u>1968-69</u> U.S. cents per lb.	<u>1969-70</u> U.S. cents per lb.
June	6.985	7.757
July	7.938	7.983
August	8.845	9.526
September	8.119	8.210
October	8.528	8.346
November	5.987	6.124
December	5.987	5.987
January	5.987	5.942
February	5.897	5.897
March	5.715	5.806
April	6.169	6.305
May	6.713	7.666

The correction coefficient applicable to lemons of quality class II, in the calculation of entry prices, has been established by the EC Commission at 1.11.